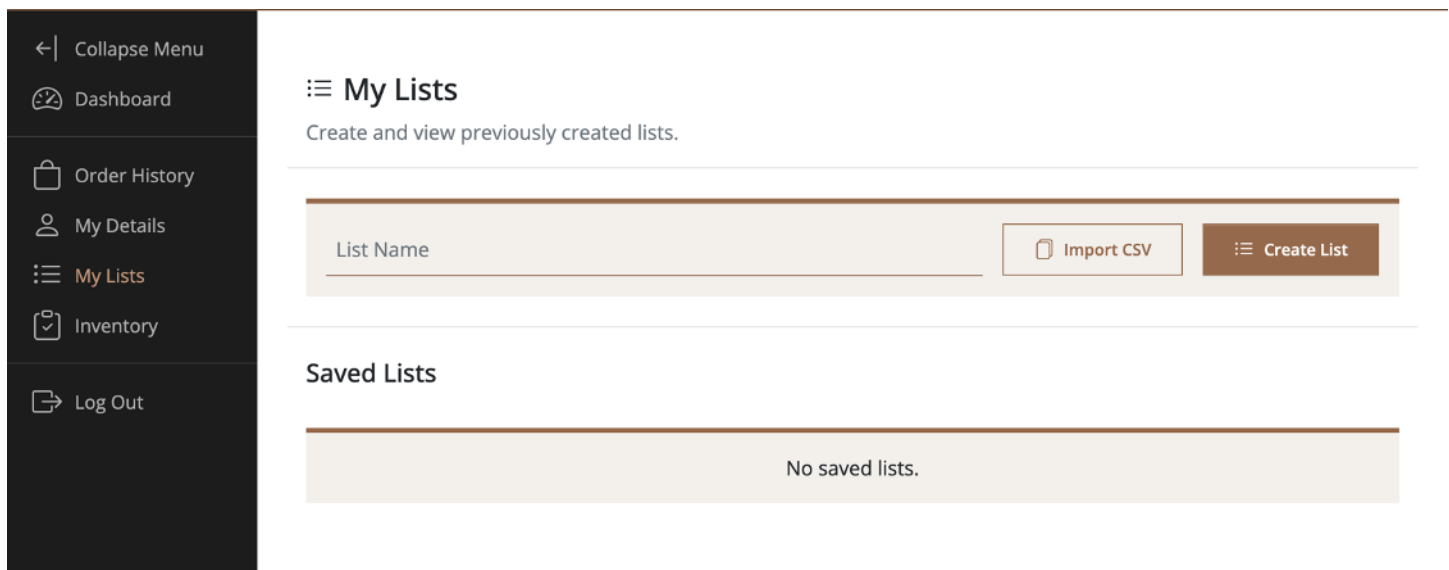


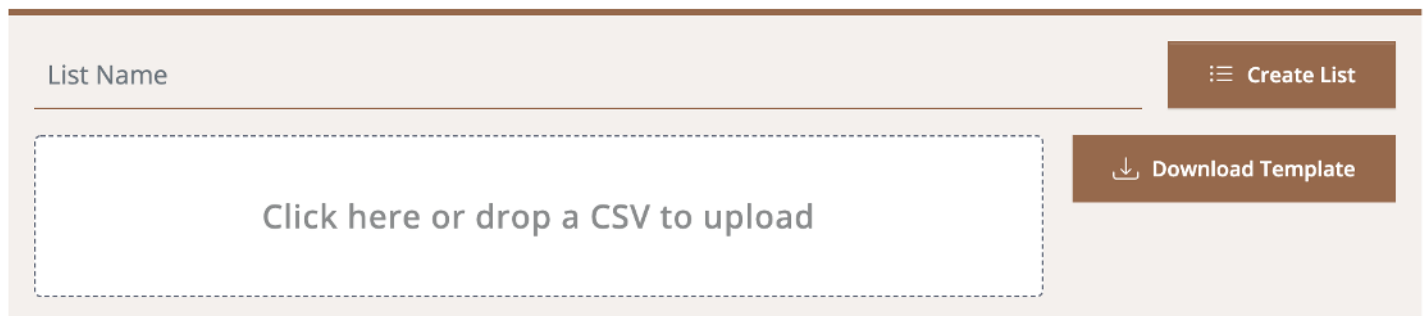
# How to Create and Manage Lists

Do you need to put a project or BOM together? That can be easily created and managed through My Lists.

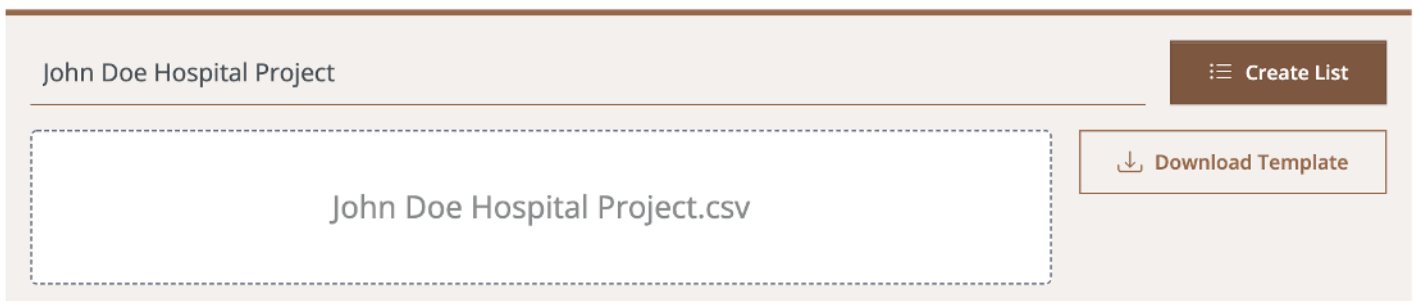
1. Click on My Lists, located on the left side of the screen. You will open a page like the below. There are several ways that you can create a list.



**Make a List Option 1 – Import CSV.** The Customer Hub can upload CSVs and dynamically create a list for you. By selecting Download Template, you will receive a CSV file that you can enter either the Southwire or Customer material number, a UOM, and the desired quantity.



When your CSV is ready, upload the file, name your list, and click on Create List.



You will receive a notification that your list has been successfully created and it will be available for view at the bottom of the screen under the heading Saved Lists.

## ☰ My Lists

Create and view previously created lists.

✔ List has been created.

☰ Create List

Click here or drop a CSV to upload

↓ Download Template

## Saved Lists

LIST NAME	# OF ITEMS	LAST MODIFIED ↑	
John Doe Hospital Project <span style="font-size: 0.8em;">✎</span>	7	Jul 07, 2022	⋮

**Make a List Option 2 – Manual Creation.** If you want to create a list manually, simply enter a list name and click on Create List.

📄 Import CSV

☰ Create List

Your newly created list will be shown under Saved Lists.

## ☰ My Lists

Create and view previously created lists.

✔ List has been created.

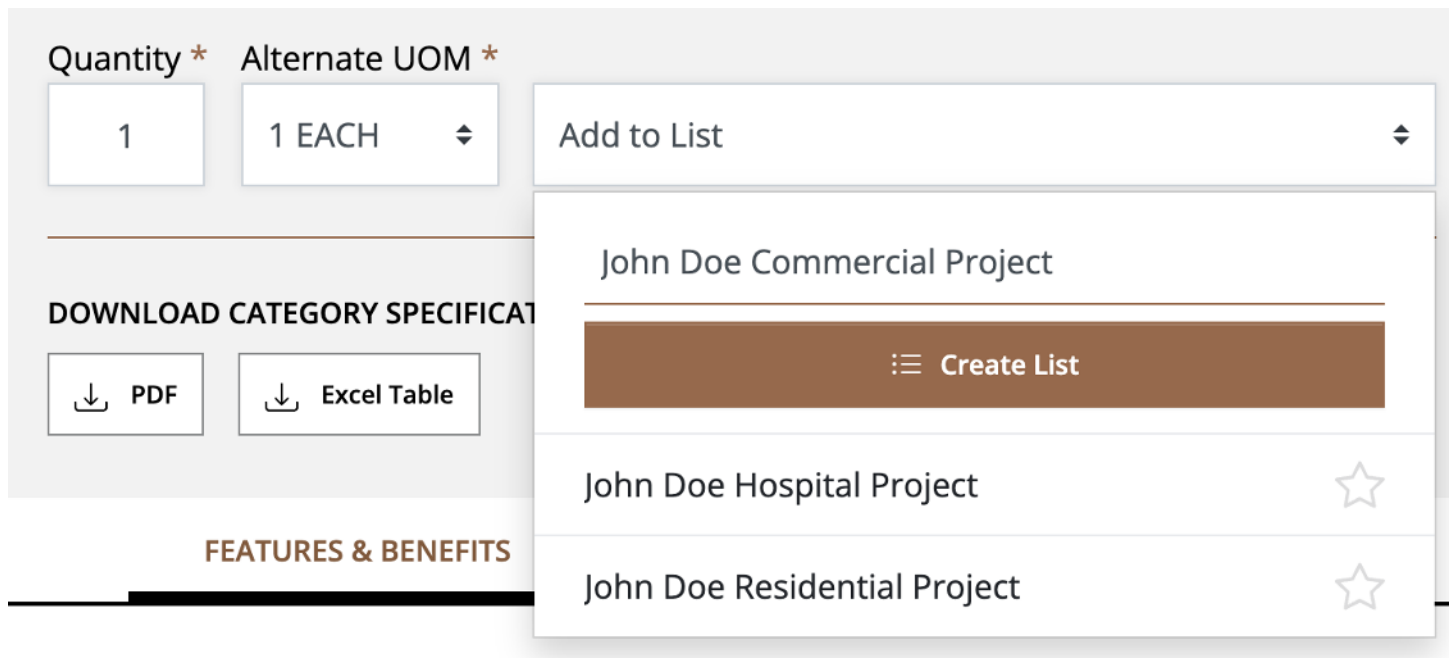
📄 Import CSV

☰ Create List

## Saved Lists

LIST NAME	# OF ITEMS	LAST MODIFIED ↑	
John Doe Residential Project <span style="font-size: 0.8em;">✎</span>	0	Jul 07, 2022	⋮

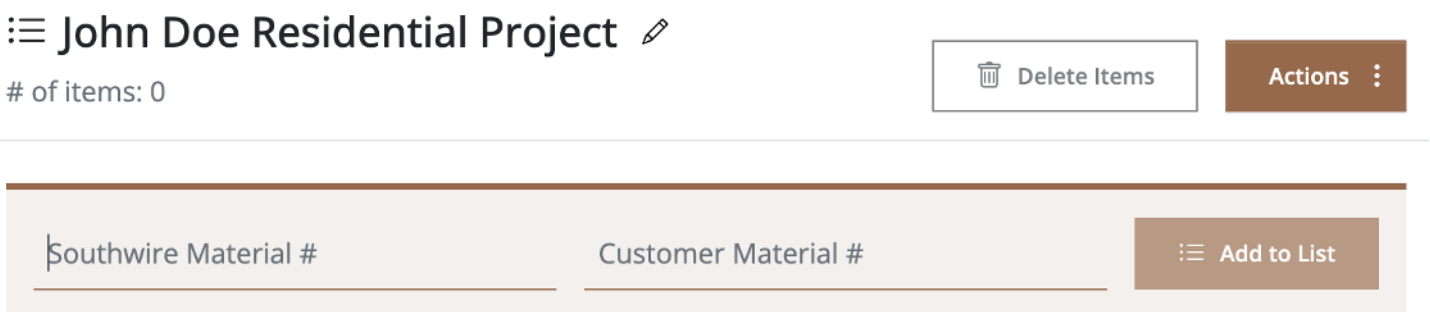
**Make a List Option 3 – From a Product Page.** If you are navigating through Southwire.com’s product pages, you can make a list by clicking on the Add to List button. Put in a list name and click Create List to save it.



The screenshot shows a product page interface. At the top left, there are two dropdown menus: 'Quantity \*' with the value '1' and 'Alternate UOM \*' with the value '1 EACH'. To the right is an 'Add to List' button with a dropdown arrow. Below this, there are two buttons for downloading category specifications: 'PDF' and 'Excel Table'. A section titled 'FEATURES & BENEFITS' is partially visible. The 'Add to List' dropdown menu is open, showing a list of projects: 'John Doe Commercial Project', 'John Doe Hospital Project', and 'John Doe Residential Project'. A 'Create List' button is positioned between the first and second project entries. Each project entry has a star icon to its right.

2. Now that lists have been created, there are three primary ways of adding products to them. The first was shown in step one through a CSV upload. Follow the steps outlined above for instructions on how to download a CSV template and upload back into the Customer Hub to populate a list.

**Add Products to List Option 2 – Manual Additions.** To add products to a list manually, click on the list you want to make additions to under Saved Lists. It will pull up a screen like the below.



The screenshot shows the manual additions screen for a list named 'John Doe Residential Project'. The list name is followed by an edit icon. Below the name, it says '# of items: 0'. To the right are two buttons: 'Delete Items' with a trash icon and 'Actions' with a dropdown arrow. Below this is a table with two columns: 'Southwire Material #' and 'Customer Material #'. At the end of the table is an 'Add to List' button with a dropdown arrow.

List is empty

To begin adding items, enter the Southwire or Customer material number for the desired products. Click Add to List and the UOM and Quantity options will display. Continue adding products to your list until it is built out to your satisfaction.

☰ John Doe Residential Project ✎

# of items: 6


🗑 Delete Items

Actions ⋮

Southwire Material #	Customer Material #	☰ Add to List
----------------------	---------------------	---------------

<input type="checkbox"/>	DESCRIPTION ↓	UOM	QUANTITY
<input type="checkbox"/>	<b>14 Piece Apprentice Kit</b> Southwire #: 65187640 Model #: 14PKIT	1 EA	1
<input type="checkbox"/>	<b>22 AWG 2/C STRANDED CU N/S CM/CL2 GY 250SPC</b> Southwire #: 511012009	250 FT	1
<input type="checkbox"/>	<b>Electrician's Work Gloves</b> Southwire #: 58739040 Model #: GLOVE1L	2 EA	1
<input type="checkbox"/>	<b>NMB 8/2 G 1000R</b> Southwire #: 28893601 Customer #: 6P-0802-02	1000 FT	10
<input type="checkbox"/>	<b>THERMOSTAT WIRE - 18/4 SOL CU UNSHIELDED CM/CL2</b> Southwire #: 553040401	250 FT	1
<input type="checkbox"/>	<b>Twist 6/3 Str CU THW 8CG 1000R</b> Southwire #: 56371101	1000 FT	1

**Add Products to List Option 3 – Product Pages.** While on a product page, you can add a product to a list by clicking Add to List. Click on the blank star of the list you want to add the product to and you will receive a message that the product has been successfully added.



**Add to List** **Contact Us**

✔ Product has been added to list

Quantity \*  Alternate UOM \*

Create List +

John Doe Commercial Project ★


John Doe Hospital Project ☆

John Doe Residential Project ☆

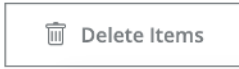

Add to List ▾

3. To manage a list, go back to My Lists and select the list you want to edit. You can rename, delete, and clone a list by clicking on the three dots on the right side, or you can open it for additional options.

**Note:** To delete a product from a list, enter 0 in its quantity.

**John Doe Commercial Project** 

# of items: 2

Southwire Material #	Customer Material #
<input type="checkbox"/> DESCRIPTION ↓	
<input type="checkbox"/> <b>CartLocker™ Xtreme™ Large Kit</b> Southwire #: 66101840 Model #: UCLX-LG	1 EA
<input type="checkbox"/> <b>SIMpull™ FLANGE</b> Southwire #: 64864901 Model #: SF-01	1 EA

- Download CSV
- Download CSV Template
- Download PDF
- Download Specifications
- Email
- Import File
- Delete List